



DEPARTMENT OF THE TREASURY
WASHINGTON, D.C. 20220

Procurement Instruction Memorandum No. 99-11 REVISION October 15, 1999

MEMORANDUM FOR BUREAU CHIEF PROCUREMENT OFFICERS

FROM: Corey Rindner, Director *Corey M. Rindner*
Office of Procurement

SUBJECT: Mandatory Training Curriculum for 1102 Series Employees (REVISION)

Purpose: To revise the implementation date of the mandatory training curriculum for 1102 Series Employees and to make revisions to the Department of the Treasury's "Procurement Career Management Handbook."

Effective Date: October 18, 1999

Expiration Date: September 30, 2001

Background: Congress amended the OFPP Act in 1996 to establish education, training, and experience requirements within the civilian acquisition workforce. The Act mandates that the education, training, and experience requirements be comparable to the Department of Defense (DOD) standards established under the Defense Acquisition Workforce Improvement Act.

PIM No. 99-11, effective August 2, 1999, established the new mandatory curriculum for all Treasury 1102 series employees and introduced the Department of the Treasury Fulfillment Program. The Department of the Treasury "Procurement Career Management Handbook" was also effective on August 2, 1999 and established the model career paths for acquisition employees as required by OFPP Policy Letter No. 97-01.

Action: Implementation of the new training curriculum for 1102 Series Employees is changed to **January 1, 2000**. Employees shall proceed with the fulfillment process and develop IDPs with supervisors if lacking competencies.

I. The following changes are made to the PIM Attachments

(a) Attachment 1 to PIM, Treasury 1102 Series Curriculum, Training Sources,
Explanation of change: Employees who entered the GS-1102 series after December 31, 1999 are required to successfully complete all courses in the new curriculum.

(b) Attachment 2 to PIM, Treasury Fulfillment Program, Paragraph 1, Explanation of change: The fulfillment process is mandatory for all applicable GS-1102 employees at Grade Level 12 and above and must be completed within 150 days of the effective date.

II. The following changes are made to the "Procurement Career Management Handbook"

(a) Chapter 1, Treasury Implementation of GS-1102 Qualification Standards

Pages 1-2 and 1-3: Explanation of Changes: (1) Education: Paragraph B changed to 24 semester hours and (2) Training: GS-13 and above change twenty-four hours annually to forty hours annually

(b) Chapter 2, Training Requirements

Page 2-3, Explanation of Change: Courses 1, 2, & 3 (or Con 101)
Courses 4, 5, & 6 (or Con 104)

Page 2-4, Explanation of change: Skills currency requirement established for Grade Level 12 and below

(c) Chapter 3, Treasury Fulfillment Program

Page 3-1, Explanation of change: Extend the established interim period to December 31, 1999.

(d) Chapter 5, Page 5-3

Explanation of Change: Level 2, Training, delete (Treasury Certificate of Fulfillment) from the end of the sentence.

Also included with this memorandum is Appendix 1-1 which was inadvertently omitted from the previous release of the handbook. Questions on this revision to PIM No. 99-11 and the "Procurement Career Management Handbook" may be directed to Annelie Kuhn at (202) 622-1577. Both the PIM and handbook are available on the Office of Procurement Policy (OP) website at www.treas.gov/procurement.

cc: Ronald Glasser, Director, Office of Personnel Policy

(Attachment 1 to PIM)

TREASURY 1102 SERIES CURRICULUM

Background Information

The Defense Acquisition University (DAU) sponsored by DOD, and the Federal Acquisition Institute (FAI), sponsored by the General Services Administration (GSA), jointly developed the required competencies for GS-1102 acquisition employees. GSA awarded a multiple schedule contract with three accredited schools to provide comparable training to the five DOD courses for acquisition employees. The GSA courses are broken down into 11 smaller segments which equate to the five DOD courses. The course syllabai for the 11 courses is the same as that offered in the five DOD courses.

Training Sources

All employees who entered the GS-1102 series on or before January 1, 1998 and those hired during the established interim period may receive competency credit through the Treasury Fulfillment Program. Employees who entered the GS-1102 series after December 31, 1999, are required to successfully complete all courses in the new curriculum. Listed below is the new mandatory curriculum for all Treasury 1102 series employees:

TREASURY 1102 SERIES CURRICULUM

Grade	Course Title	Course Length
GS-5 through 7	FUNDAMENTALS OF CONTRACTING (CON 101)	4 weeks
	OR	
	Acquisition Planning I, Contract Formation I, and Contract Administration I	2 weeks 1 week 1 week

Grade	Course Title	Course Length
GS-7 through 9	FUNDAMENTALS OF CONTRACT PRICING (CON 104) OR Price Analysis, Cost Analysis, and Federal Contract Negotiation Techniques	4 weeks 2 weeks 1 week 1 week
GS-7 through 9	INTERMEDIATE CONTRACTING (CON 202) OR Acquisition Planning II, Contract Formation II, and Contract Administration II	4 weeks 2 weeks 1 week 1 week
GS-9 through 12	INTERMEDIATE CONTRACT PRICING (CON 204)	2 weeks
GS-9 through 12	GOVERNMENT CONTRACT LAW (CON 210)	2 weeks

TREASURY FULFILLMENT PROGRAM

The Department of the Treasury Fulfillment Program provides a formal process for GS-1102 series employees hired on or before January 1, 1998 and those hired during the established interim period, to equate their past education, experience, and acquisition training taken from various sources to the courses in the new mandatory 1102 series curriculum for civilian agency employees (see Attachment A). The fulfillment process is mandatory for all applicable GS-1102 employees at Grade Level 12 and above and must be completed within 150 days of its effective date. However, applicable GS-1102 employees below Grade 12 are encouraged to seek competency credit through the fulfillment process.

A Treasury Fulfillment Review Board (TFRB) will review and approve all fulfillment requests submitted by employees. The TFRB will have one permanent representative from the Treasury Office of Procurement and one permanent representative from the Treasury Acquisition Institute (TAI). One representative from each of the Treasury bureaus will serve on the TFRB on a rotational basis. All members of the TFRB will be experienced contracting professionals. To avoid conflicts of interests, the bureau representative will not participate in evaluations and certifications of employee assessments from their own bureau. All members will reach consensus on the approval or disapproval of each fulfillment request. Upon approval by the TFRB, a Certificate of Fulfillment will be granted to the employee by the Treasury Department Senior Procurement Executive.

The Treasury Fulfillment Program is a simple series of steps which begin with an employee completing a required form requesting fulfillment based on either course equivalency or a combination of education, experience, and/or training from various sources (see Attachment B). The employee request is followed by a two-step review process. Reviews are conducted by first-line supervisors and are then forwarded to the TFRB. Listed below are the specific steps required for course fulfillment:

Step 1: The employee self-certifies all competencies through experience, education, and/or training on the Fulfillment Request Form and attaches an updated copy of his/her Treasury Acquisition Career (TRAC) record. The TFRB will not accept copies of training certificates. Employees are responsible for ensuring that their TRAC records are updated.

Step 2: The completed form is routed through the first-line supervisor for review.

Upon signature, the supervisor routes completed form to TAI.

(Attachment 2 to PIM)

Only requests showing the employee has met all competencies will be forwarded to the TFRB. Requests lacking one or more competencies require development of an achievement plan between the supervisor and the employee.

If the employee has successfully completed a required training course(s) or course equivalent(s), he/she should check the course completion block in lieu of checking off blocks in the fulfillment method section for each course competency.

If the employee has not successfully completed a required training course(s) or course equivalent(s), but determines he/she can fulfill all of the course competencies, he/she should check off the block for the applicable fulfillment method/methods (e. g. "Training", "Experience", "Education") for each course competency.

Step 3: TAI convenes the TFRB. The TFRB will review the employee request for fulfillment.

A certificate of fulfillment will be issued to an employee when all competencies have been met. Disapprovals will be in writing and will contain the rationale for disapproval of the fulfillment request.

Step 4: If disapproved, the employee and supervisor are expected to plan the employee's work assignments and training to gain competency in all deficient areas.

CERTIFICATE OF FULFILLMENT

The Certificate of Fulfillment will be accepted throughout the Department of the Treasury as evidence that the employee has satisfactorily fulfilled all required competencies. No differentiation will be made on certificates as to whether the certified competencies were based upon course equivalencies or a combination of courses, education, and experience.

(Attachment 2 to PIM)

DEFINITIONS

FULFILLMENT CERTIFICATION: The result of the Fulfillment Process through which Treasury determines that an individual satisfies competencies established for an acquisition career.

EQUIVALENT COURSE: A course that has been determined by the Treasury Fulfillment Review Board and approved by the Treasury Procurement Executive to contain the level of knowledge that would enable employees who take the course to perform as if they had completed the comparable designated required course.

FULFILLMENT PROCESS: The procedure by which acquisition employees may satisfy mandatory training requirements based on previous experience, education, and/or training successfully completed and documented based on course competency standards and procedures.

Attachment A: Course Equivalencies

Attachment B: Treasury Fulfillment Request

(Attachment A to Treasury Fulfillment Program)

COURSE EQUIVALENCIES

Any one of the courses listed in column B is equivalent to all of the courses listed in the adjacent column A. For example, CON 101, Fundamentals of Contracting is equivalent to Acquisition Planning I, **AND** Contract Formation I, **AND** Contract Administration I in column A.

A. COURSES	B. DEPARTMENT OF DEFENSE COURSES
1. ACQUISITION PLANNING I 2. CONTRACT FORMATION I 3. CONTRACT ADMINISTRATION I	CON 101 Fundamentals of Contracting Army Command & General Staff College, A423 Acquisition and Contract Management Degree Program, NPS-815 Principles of Acquisition and Contracting, NPS MN3303 Predecessors/Previous Courses: CON 101 Contracting Fundamentals (BDQ) CON 102 Operational Level Contracting Fundamentals (PEC) CON 103 Facilities Contracting Fundamentals (HEI) Management of Defense Acquisition Contracts (Basic) - (8D-4320) (MMW,BDQ) Management of Defense Acquisition Contracts (Basic)-CTC-142(HEI) Central Systems Level Contracting (G30BR6532-010) [WHS,PD6] Defense Procurement Management (8D-4320)[MMW,BDQ] Central Procurement Officer (G30BR6531-003) Contract Management Officer (G30BR6531-004) Systems/R&D Procurement Officer (G30BR6531-005) R&D Procurement Officer (G30BR6531-006) Contract Management, Systems R&D Officer (G30BR6531-007) Organizational Level Contracting (PEC) Base Procurement Officer (G30BR6531-002) Base Level Contracting (G30BR6431-002)
4. PRICE ANALYSIS 5. COST ANALYSIS 6. FEDERAL CONTRACT NEGOTIATION TECHNIQUES	CON 104 Fundamentals of Contract Pricing Army Command & General Staff College -A424 Cost & Price Theory - CMGT545 Contract Pricing and Negotiation - NPS MN3304 Acquisition and Contract Management Degree Program - NPS-815 Predecessors/Previous Courses: CON 104 Contract Pricing (BDR) CON 105 Operational Level Contract Pricing (8BH,QNU) CON 106 Facilities Contracts Pricing (MWB,BDU) Principles of Contract Pricing-QMT-170 (PBC,BDR) Defense Cost and Price Analysis/Negotiation-PN (MWB,BDU) Base Level Pricing - G30ZR6534-009 (8BH, QNU)

A. COURSE	B. DEPARTMENT OF DEFENSE COURSES
7. ACQUISITION PLANNING II 8. CONTRACT FORMATION II 9. CONTRACT ADMINISTRATION II	CON 202 Intermediate Contracting Acquisition and Contract Management Degree Program - NPS-815 Predecessors/Previous Courses: CON 211 Intermediate Contracting (BDN) CON 221 Intermediate Contract Administration (BDQ) CON 222 Operational Level Contract Administration (PDQ) CON 223 Intermediate Facilities Contracting (BE4) Management of Defense Acquisition Contracts (ADV0-8D-F12 (MMX,BDN) Contract Administration (Advanced) - PPM-304[AAS,BDO] CON 222 Organization Level Contract Administration [PDQ] Base Contract Administration - G3ZAR65170-002 [LY2,PDQ] Advanced Contract Management (Construction) - CTC-542 [BE4]
10. INTERMEDIATE CONTRACT PRICING	CON 204 Intermediate Contract Pricing CON 235 Advanced Contract Pricing Contract Pricing and Negotiation - NPS MN3304 Acquisition and Contract Management Degree Program - NPS-815 Predecessors/Previous Courses: CON 231 Intermediate Contract Pricing [BU6] Intermediate Cost & Price Analysis QMT-345 [UGH,BCC] Intermediate Pricing - QMT-340 [BCC]
11. GOVERNMENT CONTRACT LAW	CON 210 Government Contract Law Legal Principles of Government Contracting - LAWS550 Acquisition and Contract Management Degree Program - NPS-815 Contract Law NPS-MN3312 Predecessors/Previous Courses: CON 201 Government Contract Law (BDP) CON 201(C) Government Contract Law (Construction) {BDP} Government Contract Law PPM-302 (D99,BDP) Government Contract Law Construction - CTC-302 (D99,BDP) Base Contract Law G30ZR6534-007 [PDT] AFIT Contract Law 166 USAF ECI Correspondence Course 6607

NOTE: See DoD website at www.acq.osd.mil/dau/train.html for lists of predecessor courses to the above listed equivalencies and updates to this list of equivalencies.

(Attachment B to Treasury Fulfillment Program)

INSTRUCTIONS

Section I Self-Explanatory

Section II Employee completes self-certification by checking one or more of the three fulfillment methods

Section III To be completed by Treasury Fulfillment Review Board

NOTE: A current Treasury Acquisition Career (TRAC) record must accompany this request.

1. NAME (Last, First, Middle Initial)

2. BUREAU

3. MAILING ADDRESS

4. PHONE NUMBER

5. TITLE/SERIES/GRADE

6. STATEMENT

I certify that the competencies identified for the Department of the Treasury required courses have been obtained either through (1) equivalent courses, or (2) a combination of my experience, education, or training. Based on the information provided below, I request that this be considered fulfillment of all training requirements.

7. EMPLOYEE SIGNATURE & DATE

8. REVIEWER SIGNATURE (First Line Supervisor) &
DATE

9. APPROVED ☐

10. DISAPPROVED ☐ (see attached)

11. SIGNATURES OF BOARD MEMBERS:

12. DATE SIGNED

TITLE:
Bureau Representative

TITLE:
Treasury Acquisition Institute

TITLE:
Treasury Office of Procurement

Successfully Completed the Acquisition Planning I or CON 101 Basics of Contracting Course ____ Yes ____ No
(If no, continue with the competencies fulfillment method)

FULFILLMENT METHOD

COMPETENCIES	Training	Experience	Education
(A) <u>Forecasting Requirements</u> - Collect data from requirements managers on future acquisitions. Plan and organize to meet the anticipated requirements.			
(B) <u>Acquisition Planning</u> - Assist managers in preparing written, formal acquisition plans.			
(C) <u>Requisitions</u> - Review the requisition, obtain additional information and corrections.			
(D) <u>Funding</u> - Verify that adequate funds have been committed.			
(E) <u>Market Research</u> - Obtain data from acquisition histories and other sources. Coordinate and participate in early exchanges.			
(F) <u>Requirements Documents</u> - Review and critique proposed requirement documents.			
(G) <u>Use of Government Property and Supply Sources</u> - Determine whether to furnish Government property or authorize use of Government supply sources by the contractor.			
(H) <u>Services</u> - Screen requisitions for requests to acquire personal services or advisory and assistance services. Request any required Wage Determinations.			
(I) <u>Sources</u> - Compare requisitions against required sources of supply, or develop and maintain an open market source list.			
(J) <u>Competition Requirements</u> - Determine the extent of competition.			
(K) <u>Unsolicited Proposals</u> - Process unsolicited proposals and determine whether to noncompetitively acquire the offered services.			
(L) <u>Set-asides</u> - Review requirement for small business set aside decision.			
(M) <u>8(a) Acquisitions</u> - Determine whether to obtain the supply or service using the procedures of the Small Business Administration's (SBA's) 8(a) program.			
(N) <u>Lease vs. Purchase</u> - Analyze whether to solicit for lease, purchase, or both.			
(O) <u>Price Related Factors</u> - Identify applicable factors (e.g., multiple award, Buy American, energy efficiency, transportation, life cycle costs) for the solicitation.			
(P) <u>Non-Price Factors</u> - Select non-price evaluation factors for award and determine their applicability.			
(Q) <u>Method of Procurement</u> - Determine whether to use Part 12, Part 14 or Part 15 for solicitations.			
(R) <u>Contract Types</u> - Choose contract type that will minimize risks.			
(S) <u>Recurring Requirements</u> - Select appropriate methods to solicit for prospective requirements.			

FULFILLMENT METHOD			
COMPETENCIES (continued)	Training	Experience	Education
(T) <u>Unpriced Contracts (letter contracts & unpriced purchase orders)</u> - Determine when it is necessary to use a letter contract or an unpriced order; draft letter contract or unpriced order.			
(U) <u>Contract Financing for Commercial Contracts</u> - Analyze financing options for incorporation into solicitation.			
(V) <u>Noncommercial Contract Financing</u> -Analyze financing options for incorporation into solicitation.			
(W) <u>Need For Bonds</u> - Determine whether bonds are required or necessary to protect the Government from market risks.			
(X) <u>Method of Payment</u> - Select the method of payment.			
(Y) <u>Performance-Based Contracting</u> - Review the Statement of Work to see if it is based on the expected results rather than how the work is to be performed.			
(Z) <u>Electronic Commerce</u> - Apply available technology to enhance the quality and timeline of work products/services.			

Successfully Completed the Contract Formation I or CON 101 Basics of Contracting Course ____ Yes ____ No
(If no, continue with the competencies fulfillment method)

FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Publicizing Proposed Procurements</u> - Prepare CBD notice or other electronic publication method.			
(B) <u>Oral Quotes</u> - Solicit quotes.			
(C) <u>RFQ Preparation</u> - Prepare and release RFQs.			
(D) <u>Solicitation Preparation (RFPs for Commercial Items)</u> - Research clauses and assemble a Request for Proposals (RFP).			
(E) <u>Solicitation Preparation (RFPs for Noncommercial Items)</u> - Research clauses and assemble a Request for Proposals (RFP).			
(F) <u>Solicitation Preparation (IFBs for Commercial Items)</u> - Research clauses and assemble an Invitation for Bids (IFB).			
(G) <u>Solicitation Preparation (IFBs for Noncommercial Items)</u> - Research clauses and assemble an Invitation for Bids (IFB).			
(H) <u>Preaward Inquiries</u> - Answer inquiries about the solicitation.			
(I) <u>Prebid/Preproposal Conferences</u> - Provide offerors with a public forum to review the site, question the solicitation, or express any concerns.			
(J) <u>Amending/Canceling Solicitations</u> -Prepare and issue any required amendments.			
(K) <u>Amending/Canceling Quotes</u> -Prepare and issue any required amendments.			
(L) <u>Processing RFQs</u> - Prepare and issue RFQ, resolve late quotes, and determine best value. Make determination of price reasonableness.			
(M) <u>Processing RFPs</u> - Prepare and issue solicitations, resolve late proposals, evaluate proposals, and make determination of best value.			
(N) <u>Processing IFBs</u> - Receive and control bids submitted against an Invitation for Bids. Open and abstract bids.			
(O) <u>Applying Past Performance, Technical and other Nonprice Factors</u> - Review proposed evaluation factors and determine whether to award on lowest price or greatest value.			
(P) <u>Award Without Discussions</u> - Determine whether to award without discussions and make award.			
(Q) <u>Negotiation Strategy</u> - Prepare a prenegotiation plan and hold negotiations. Request and evaluate revised offers.			
(R) <u>Responsibility</u> - Make a determination of responsibility on the prospective contractor.			
(S) <u>Award (Commercial)</u> - Prepare or obtain final source selection decision. Prepare award documents and obtain necessary reviews/approvals/signature and issue the award.			

Section II - Employee Competency Assessment

FULFILLMENT METHOD			
COMPETENCIES (continued)	Training	Experience	Education
(T) <u>Award (Non-Commercial)</u> - Prepare or obtain final source selection decision. Prepare award documents and obtain necessary reviews/approvals/signature and issue the award.			
(U) <u>Debriefing</u> - Conduct timely debriefings of vendors.			
(V) <u>Protests</u> - Research and prepare positions on protests of the award.			

Successfully Completed the Contract Administration I or CON 101 Basics of Contracting Course (If no, continue with the competencies fulfillment method) ___ Yes ___ No			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Contract Administration Planning</u> - Review the contract and related acquisition histories, and identify key milestones. Delegate authority to CORs, COTRs, and ACOs.			
(B) <u>Contract Modifications (Commercial)</u> - Determine if proposed modification is within scope of contract and ensure adequate funds are available. Execute the modification.			
(C) <u>Contract Modifications (Non-Commercial)</u> - Determine if proposed modification is within scope of contract and ensure adequate funds are available. Execute the modification.			
(D) <u>Options</u> - Verify reasonableness of option price and exercise the option.			
(E) <u>Monitoring, Inspection, and Acceptance (Commercial Contracts)</u> - Monitor performance by contractor and Government personnel against the contract schedule.			
(F) <u>Performance-Based Payments</u> - Review requests for payments and substantiate performance. Where necessary, reduce or suspend payments, adjust the payment schedule or demand repayment.			
(G) <u>Advance Payments</u> - Review requests for payments, establish the special bank account and negotiate suitable covenants. Monitor withdrawals from the bank account and interest owed the Government.			
(H) <u>Delays</u> - Determine whether delay is excusable and negotiate consideration.			
(I) <u>Commercial/Simplified Acquisition Remedies</u> - Identify and apply and contractual remedies.			
(J) <u>Remedies (Noncommercial Contracts)</u> - Identify and apply any contractual remedies.			
(K) <u>Documenting Past Performance</u> - Obtain performance information from the requiring activity and other Government sources. Reconcile discrepancies between the contractor version of events with reported past performance information. Document the file.			
(L) <u>Termination For Cause (Simplified Acquisitions/Commercial Contracts)</u> - Determine the need and adequacy of the case for termination, and issue the termination notice.			
(M) <u>Stop Work</u> - Determine whether to stop work, and issue the stop work order. Initiate resumption of work and modify the contract as necessary.			
(N) <u>Defective Pricing</u> - Identify and report indicators of defective pricing. Arrange audit of the data. Determine whether the data is defective, the degree relied upon, and the downward adjustment.			
(O) <u>Close-Out</u> - Verify that the contract is physically complete and that other terms and conditions have been satisfied. Prepare the close out file.			

Successfully Completed the Price Analysis or CON 104 Principles of Contract Pricing Course ___ Yes ___ No (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Price Related Factors</u> - Identify applicable factors for the solicitation.			
(B) <u>Price Analysis</u> - Critique the government estimate. Apply price related factors in the solicitation offers or quotes, and evaluate and compare prices. Develop price related prenegotiation objectives for discussions with vendors.			
(C) <u>Pricing Information</u> - Determine the need for information from offerors other than cost or pricing data.			

Successfully Completed the Cost Analysis or CON 104 Principles of Contract Pricing Course ___ Yes ___ No (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Cost Information From Offerors</u> - Obtain the certificate as applicable. Determine the need for information from offerors other than cost or pricing data.			
(B) <u>Indirect Costs</u> - Adjust billing rates as necessary . Select either the quick close-out procedure and negotiate final indirect cost rates or obtain final indirect rates from the cognizant agency.			
(C) <u>Audits</u> - Obtain audit of the submitted cost and pricing data and analyze results.			
(D) <u>Cost Accounting Standards (Non-Commercial)</u> - Determine whether CAS applies to the entity and the type of coverage.			
(E) <u>Cost Analysis</u> - Develop prenegotiation positions on proposed elements of cost and fee.			

Successfully Completed the Federal Contract Negotiation Techniques or CON 104 Principles ____ Yes ____ No of Contract Pricing (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Fact finding</u> - Identify and collect information from the offeror necessary to complete the Government's analysis of the proposal.			
(B) <u>Negotiation Strategy</u> - Prepare a prenegotiation plan and brief management when required.			
(C) <u>Conducting Discussions/Negotiations</u> - Conduct negotiations with offerors and document the principal elements of the negotiated agreement. After concluding competitive discussions, request and evaluate revised proposals.			

Successfully Completed the Acquisition Planning II or CON 202 Intermediate Contracting Course (If no, continue with the competencies fulfillment method) <input type="checkbox"/> Yes <input type="checkbox"/> No			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Forecasting Requirements</u> - Collect data from requirements managers on future acquisitions. Plan and organize to meet the anticipated aggregate requirements.			
(B) <u>Acquisition Planning</u> - Assist managers in preparing written, formal acquisition plans.			
(C) <u>Funding</u> - Verify that adequate funds have been committed.			
(D) <u>Market Research</u> - Obtain data from acquisition histories and other sources. Coordinate and participate in early exchanges.			
(E) <u>Requirements Documents</u> - Review and critique proposed requirement documents.			
(F) <u>Use of Government Property and Supply Sources</u> - Determine whether to furnish Government property or authorize use of Government supply sources by the contractor.			
(G) <u>Services</u> - Screen requisitions for requests to acquire personal services or advisory and assistance services. Request any required Wage Determinations.			
(H) <u>Unsolicited Proposals</u> - Process unsolicited proposals and determine whether to noncompetitively acquire the offered services.			
(I) <u>Non-Price Factors (FAR Parts 12 & 13 Solicitations)</u> - Select non-price evaluation factors for award and their applicability.			
(J) <u>Contract Types (Commercial Contracts)</u> - Select contract type that will minimize risks.			
(K) <u>Recurring Requirements</u> - Select appropriate methods to solicit for currently unfunded, prospective requirements.			
(L) <u>Unpriced Contracts (letter contracts & unpriced purchase orders)</u> . Draft letter contracts and unpriced orders as required.			
(M) <u>Contract Financing for Commercial Contracts</u> - Analyze financing options for incorporation into solicitation.			
(N) <u>Noncommercial Contract Financing</u> - Analyze financing options for incorporation into solicitation.			
(O) <u>Need For Bonds</u> - Determine whether bonds are required or necessary to protect the Government from market risks.			
(P) <u>Method of Payment</u> - Select method of payment.			

Successfully Completed the Contract Formation II or CON 202 Intermediate Contracting Course ___ Yes ___ No (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>RFPs for Non-Commercial Items</u> -Research clauses and assemble a Request for Proposals (RFP).			
(B) <u>Applying Past Performance, Technical & Other Non-Price Factors (Under FAR Part 15 for Non-Commercial Items)</u> - Review proposed evaluation factors and determine whether to award on lowest price or greatest value.			
(C) <u>Terms and Conditions</u> - Evaluate other proposed terms and conditions.			
(D) <u>Competitive Range</u> - Review proposals for award without discussion. If discussions are necessary, determine the competitive range and notify offerors outside the range.			
(E) <u>Subcontracting Requirements</u> - Where required, obtain a subcontracting plan from the offeror and negotiate improvements to it. Negotiate make or buy programs.			
(F) <u>Mistakes (Postaward)</u> - Investigate and resolve mistakes alleged after award.			
(G) <u>Late Offers</u> - Determine whether a late offer or quotation may be considered for award.			
(H) <u>Price Analysis (Sealed Bidding)</u> - Apply the price related factors in the IFB, identify the low bid for each potential award, and analyze the reasonableness of the lowest priced bid.			
(I) <u>Responsiveness</u> - Determine whether the lowest bid is responsive to the terms and conditions of the IFB. Resolve minor informalities and irregularities. Reject nonresponsive bids.			
(J) <u>Preaward Mistakes in Bids</u> - Identify potential mistakes, verify bids and resolve alleged mistakes.			

Successfully Completed the Contract Administration II or CON 202 Intermediate Contracting ____ Yes ____ No Course (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Contract Administration Planning</u> - Review the contract and related acquisition histories. Identify key milestones. Delegate authority to CORs, COTRs, and/or ACOs.			
(B) <u>Post-award Conferences</u> - Participate in post-award conferences.			
(C) <u>Subcontracting Requirements</u> - Monitor contractor performance against subcontractor plans.			
(D) <u>Contract Modifications (Non-Commercial Contracts)</u> - Review proposed modifications against the scope of work and availability of funds. Execute the modification.			
(E) <u>Monitoring, Inspection, and Acceptance (Noncommercial Contracts)</u> - Monitor performance by contractor and Government personnel against the contract schedule.			
(F) <u>Delays</u> - Determine whether delay is excusable and negotiate consideration.			
(G) <u>Stop Work</u> - Determine whether to stop work and issue the stop work order. Unless the contract is terminated, initiate resumption of work and modify the contract as necessary.			
(H) <u>Remedies (Non-Commercial Contracts)</u> - Identify contractual remedies. Determine which remedy applies.			
(I) <u>Unallowable Costs</u> -Review invoiced costs for allowability and prepare notice of intent to disallow or actual disallowance. Determine whether to withdraw or sustain the notice and/or allow part of the costs.			
(J) <u>Payment of Indirect Costs</u> - Adjust billing rates as necessary to prevent substantial overpayment or underpayment of indirect costs. Select either the quick closeout procedure and negotiate final indirect cost rates or obtain final indirect rates from the cognizant agency.			
(K) <u>Limitation of Costs</u> - If a cost reimbursement contract, determine if the contractor has exceeded the ceiling listed in the contract. Recommend an appropriate alternative if the contractor will not be able to complete the work within the amount obligated.			
(L) <u>Price and Fee Adjustments</u> - Monitor payments and adjust billing prices. Given the economic price adjustment, incentive or award formula in the contract, establish the final fee or price.			
(M) <u>Unpriced Purchase Orders</u> - Determine reasonableness of invoiced price.			
(N) <u>Letter Contracts</u> - Definitize the contracts.			
(O) <u>Task and Delivery Order Contracting</u> - Place orders against task and delivery order contracts.			
(P) <u>Invoices</u> - Identify withholdings and deductions, and instruct payment office and contractor of any changes.			

FULFILLMENT METHOD			
COMPETENCIES (continued)	Training	Experience	Education
(Q) <u>Progress Payments</u> - Review requests for progress payments. Monitor liquidation. Where necessary, reduce or suspend payments, adjust liquidation rates, or grant unusual progress payments.			
(R) <u>Collecting Contract Debts</u> - Determine indebtedness. Identify and obtain repayment and respond to requests for deferment.			
(S) <u>Assignment of Claims</u> - Review requests for assignment of claims. Execute receipt of Notice of Assignment.			
(T) <u>Property Administration</u> - Establish reporting requirements, monitor delivery of Government property and review contractor property control systems. Determine liability for damage or misuse and negotiate consideration. Recover or dispose of the property.			
(U) <u>Intellectual Property</u> - Monitor compliance with the intellectual property sections of FAR 52.212-4, Contract Terms and Conditions—Commercial Items. Identify, investigate, and resolve problems with patents and/or data rights.			
(V) <u>Administering Socio-economic and Other Miscellaneous Terms</u> - Enforce compliance with socio-economic contractual requirements.			
(W) <u>Claims</u> - Research and process the claim. Participate in appeals process or ADR.			
(X) <u>Termination for Default (Non-Commercial Contracts)</u> - Determine the need for termination for default. Issue the termination notice. If bonded, obtain performance or payment from surety. Reprocure and demand payment for the excess costs of reprocurement.			
(Y) <u>Defective Pricing</u> - Identify and report indicators of defective pricing. Arrange audit of the data. Determine whether the data is defective, the degree relied upon, and the downward adjustment.			
(Z) <u>Cost Accounting Standards</u> - Review Disclosure Statements, and notify contractor of noncompliance. Review proposed accounting changes, and negotiate any necessary cost impact adjustments.			
(AA) <u>Termination for Convenience</u> - Determine whether to terminate and proceed with the termination action.			
(AB) <u>Extraordinary Relief</u> - Determine whether relief is called for and what type is merited. Execute the contract action.			
(AC) <u>Accounting and Estimating Systems</u> - Determine the need to audit a contractor's accounting or estimating system. Negotiate improvements and monitor implementation.			
(AD) <u>Closeout</u> - Verify that contract is physically complete and other terms and conditions have been satisfied. Verify that there are no outstanding claims or disputes. Obtain final invoice and follow prescribed close out procedures.			

Successfully Completed the Intermediate Contract Pricing or CON 204 Intermediate Contract ___ Yes ___ No Pricing Course (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Price Analysis</u> - Develop prenegotiation positions on proposed elements of cost and fee.			
(B) <u>Contract Modifications (Equitable Adjustments)</u> - Determine the need for supplemental agreements and whether it is within scope of the contract. Issue the modification.			
(C) <u>Defective Pricing</u> - Understand defective pricing, cost realism analysis, contract types, and pricing terminations for convenience and default.			
(D) <u>Unallowable Costs</u> - Determine whether invoiced costs are allowable and issue notice of intent to disallow on applicable costs. Based on discussions with the contractor, determine whether to withdraw or sustain the notice and/or allow part of the costs.			

Successfully Completed the Government Contract Law or CON 210 Government Contract Law Course ____ Yes ____ No (If no, continue with the competencies fulfillment method)			
FULFILLMENT METHOD			
COMPETENCIES	Training	Experience	Education
(A) <u>Legal Environment</u> - Identify elements of a contract, statutes, regulations, case law, and administrative law that define the Federal acquisition system. Research the FAR and other source documents.			
(B) <u>Impact</u> - Analyze and determine the manner in which the various pieces of federal legislation and judicial and administrative decisions impact the formation of government contracts.			
(C) <u>Protests</u> - Identify the different procedures and remedies available to bidders or offerors and the forums available in which to protest a government acquisition.			
(D) <u>Fraud & Exclusion</u> - Refer indications of fraud or other civil or criminal offenses to responsible officials.			